

California State  
**PTA**  
everychild.onevoice.®

MAKING A  
DIFFERENCE  
EVERY DAY

# Welcome

LEADERS WELCOME PACKET 2023-2024

EVERY DAY  
IS YOUR  
CHANCE TO  
MAKE PTA  
BETTER

A RESOURCE GUIDE FOR PTA LEADERS



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- Association Insurance Management, Inc (AIM) - PTA Insurance
- Ed100 - Earn your certificate as an Ed100 Graduate
- PTA Store - shop now for the upcoming year!

### ADDITIONAL RESOURCES

- **Convention 2023 Highlights** *(separate publication in packet)*
- **Running Your PTA ... Made Easy** *(separate publication in packet)*



# PRESIDENT'S WELCOME LETTER

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August 2023

Greetings PTA Leader!



I want to be one of the first to welcome you to the 2023 PTA Term. Thank you so much for stepping into this important role in your PTA. I know that this year is going to be full of wonderful programs and activities for your community to enjoy because of the hard work of you, your executive board, and the rest of your PTA volunteers.

## EVERY DAY IS YOUR CHANCE TO MAKE PTA BETTER

As a local PTA leader, your dedication and hard work are what make PTA such a powerful force for good in our schools and communities. But PTA isn't just about the events and activities, it's also about the small, everyday actions that you take as a leader. It's about taking the time to listen to the concerns and needs of your members and finding creative solutions to the challenges you face. It's about making sure that every voice is heard and that everyone feels valued and included in the work of PTA.

To help make your job easier, this Leader Welcome Packet is filled with resources for you and your PTA team.

- Share the resources with your board and committee members
- Download and share extra copies of anything you need from our [website](#) and use the many QR codes and links found in the online version of the packet
- Check the [PTA calendar](#) on the website often to learn about new and exciting events and opportunities from California State PTA
- Stay connected to your [council and district](#) leaders so you don't miss out on local and regional opportunities for training or other programs
- Visit the California State PTA [Leaders'](#) site that is full of information just for you and your executive board team

As we begin this year, my job and the role of California State PTA board members is to support you, our local leaders, to be the best leaders you can be. We will provide you with the resources and materials to make your job easier, try to simplify processes, and hopefully inspire you to "[positively impact the lives of all children and families](#)." If you have suggestions for us, please let us know - you can find our contact information on our [website](#).

I want to thank you for your dedication to the PTA and the children and families of California.

**Working together we truly can make a difference every day with PTA!**

**Shereen Walter**

President

California State PTA





# Resources

## *for PTA Officers*

PTA is an entire local, state, and national organization here to help you make your PTA — and your PTA experience — the very best. We've got it all, from tips on running a local meeting and creating membership materials to leadership hints, important finance reminders, and even pointers on how to write statewide resolutions. And if you have questions or concerns, call or write so we can assist you.

### IN THIS SECTION

#### **President**

- Should keep a copy of all pages
- PTA ORDER FORM: Toolkit and Bylaws

#### **All Officers**

- PTA CALENDAR: reminders and due dates
- Electronic Membership (TOTEM)
- Leaders Website

#### **Treasurer**

- Tax Filing Requirements
- Workers' Compensation
- Insurance Procedures

#### **Membership**

- Membership Resources
- Spotlight Awards
- National PTA Membership Kit

#### **Parliamentarian**

- PTA Bylaws Review Steps
- PTA eBylaws

#### **Communications**

- Online Resources

### ADDITIONAL RESOURCES

#### **On our website: [leaders.capta.org](http://leaders.capta.org)**

- Job Descriptions
- Finance Information
- Bylaws and Standing Rules
- Parliamentary Procedure
- Nominations and Elections
- Grants and Scholarships
- Membership and Marketing tips
- Communications

#### **In the PTA Toolkit [toolkit.capta.org](http://toolkit.capta.org)**

The Toolkit provides guidance, instruction and ideas to ensure a successful term as a PTA officer or chair. You will discover valuable information to assist your PTA/PTSA with the important work that you do on behalf of all children and families.



## PTA LEADER FREE MATERIALS ORDER FORM

**Electronic copies of all the resources and materials included in the Leader Welcome Packet are available to download, print and share online at [leaders.capta.org](https://leaders.capta.org).**

PTAs can request one free copy of the following items::

- California State PTA Toolkit
- 2023 Bylaws for units, councils, and districts (see also: eBylaws on our website, [leaders.capta.org/leadership/ebylaws](https://leaders.capta.org/leadership/ebylaws))

Bilingual (Spanish/English) hard copy\* bylaws are available to be ordered in any quantity needed.

\* Orders should be placed using the form linked on this page (offer only available through 10/1/2023). Please allow four weeks for delivery.

**FREE Orders must be received by October 1, 2023.**



## PTA LEADER PURCHASE MATERIALS ORDER FORM

**Electronic copies of all the following are available to download, print, and share year-round online at [capta.org](https://capta.org) and [leaders.capta.org](https://leaders.capta.org):**

- 2023 Running Your PTA ...Made Easy
- 2023 Leader Welcome Packet (a.k.a. the summer service mailing)
- 2023 Convention Highlights
- California State PTA Toolkit in English and Spanish
- Bylaws for units, councils and districts (eBylaws in English only)

**California State PTA units, councils, and districts may also purchase\* as many copies of the following printed materials, year-round:**

- California State PTA Toolkit
- 2023 Bylaws for units, councils, and districts - English version (see also: eBylaws on our website, [leaders.capta.org/leadership/ebylaws](https://leaders.capta.org/leadership/ebylaws))

California State PTA units, councils, and districts can request free bilingual (Spanish/English) hard copy\* bylaws in any quantity needed, year round.



\* Orders should be placed using the form linked on this page. Please allow four weeks for delivery.



# CALENDAR: REMINDERS & DUE DATES

Check with your Council/District for local due dates.  
Check the California State PTA website calendar for details, additions, and updates.  
Use this as a guide for your PTA year.

DESCRIPTION	DUE TO COUNCIL <i>OR, Insert Council Due Date(s) as needed</i>	DUE TO DISTRICT <i>OR, Insert District Due Date(s) as needed</i>	DUE TO STATE <i>OR, Insert State Due Date(s) as needed</i>
<b>JULY 2023</b>			
Term Begins		July 1	July 1
Confirm all officer contact information is in MyPTEZ			June 1
Set PTA Program Calendar and due dates			
Review Bylaws	Review Annually. Submit every 5 years		
Prepare Year-End Financial Review	Forwarded/ uploaded after adoption <a href="https://capta.org/resource/membership-toolbox-for-pta-leaders/">capta.org/resource/membership-toolbox-for-pta-leaders/</a>	Forwarded/ uploaded after adoption	Forwarded/ uploaded after adoption
Begin Membership Campaign	Remit per capita membership dues <a href="https://capta.org/pta-leaders/services/electronic-membership-system">capta.org/pta-leaders/services/electronic-membership-system</a>	Remit per capita membership dues	Remit per capita membership dues
Update Leaders in E-membership (TOTEM)	When elected or appointed	When elected or appointed	When elected or appointed
Update bank and check signer information as needed at bank and in TOTEM			
<b>AUGUST 2023</b>			
Upload to MyPTEZ : <ul style="list-style-type: none"> <li>current Fiscal Year Budget</li> <li>End of Year Financial Review for Prior Fiscal Year</li> <li>Annual Financial Report (Budget vs. Actuals) for Prior Fiscal Year</li> </ul>	As soon as possible after adoption	As soon as possible after adoption	As soon as possible after adoption
Continue Membership Campaign	Remit per capita membership dues	Remit per capita membership dues	Remit per capita membership dues
<b>SEPTEMBER 2023</b>			
Continue Membership Campaign	Remit per capita membership dues	Remit per capita membership dues	Remit per capita membership dues



# CALENDAR: REMINDERS & DUE DATES

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Check with your Council/District for local due dates.  
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<b>OCTOBER 2023</b>			
Continuing Education Scholarship Applications	N/A	N/A	October 15
PTA Program Grant Applications	N/A	N/A	October 15
Continue Membership Campaign	Remit per capita membership dues	Remit per capita membership dues	Remit per capita membership dues
Ready, Set ... Remit! Membership Award	N/A	N/A	October 31
<b>NOVEMBER 2023</b>			
National PTA Reflections Theme Search Entries	N/A <a href="https://capta.org/programs-events/reflections/theme-search/">capta.org/programs-events/reflections/theme-search/</a>	N/A	November 1
DRAFT PTA Resolutions	N/A <a href="https://capta.org/focus-areas/advocacy/resolutions">capta.org/focus-areas/advocacy/resolutions</a>	N/A	November 1
Tax forms submitted to: <ul style="list-style-type: none"> <li>• IRS</li> <li>• Franchise Tax Board (FTB)</li> <li>• Attorney General's Registry of Charitable Trusts (AG/RCT)</li> </ul>	<b>Due 15th day of the 5th month following the end of your Fiscal Year (FYE).</b> For PTAs with a FYE end of June 30, the date is November 15. <i>Check your Bylaws for your Fiscal Year!</i>		
Continue Membership Campaign. Check our website for new incentives and membership challenges. Coming Soon!	Remit per capita membership dues <a href="https://leaders.capta.org/membership/incentives-and-challenges">leaders.capta.org/membership/incentives-and-challenges</a>	Remit per capita membership dues	Remit per capita membership dues

# CALENDAR: REMINDERS & DUE DATES

Check with your Council/District for local due dates.  
Check the California State PTA website calendar for details, additions, and updates.  
Use this as a guide for your PTA year.

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<b>DECEMBER 2023</b>			
Minimum per capita memberships (15) due to remain in good standing			December 1
Insurance Premium Due	December 20 <i>Pay directly to Association Insurance Management, Inc. (AIM)</i>		
Check for new incentives and membership challenges	Remit per capita membership dues	Remit per capita membership dues	Remit per capita membership dues
<b>JANUARY 2024</b>			
<b>California State PTA Legislative Conference</b>	January 2024 TBD in Sacramento <b>All Leaders Encouraged and Welcome to Register</b>		
FINAL Resolution Submission	N/A	N/A	January 5
Reflections Art Program entries - must be submitted through channels*			January 15 Due to California State PTA from District PTAs
Workers' Compensation Annual Payroll Report	January 31 <i>Submit directly to Association Insurance Management, Inc. (AIM)</i>		
Kick off Mid-Year Membership Campaign - check for new incentives and challenges	Remit per capita membership dues	Remit per capita membership dues	Remit per capita membership dues <a href="https://leaders.capta.org/membership/incentives-and-challenges">leaders.capta.org/membership/incentives-and-challenges</a>
<b>FEBRUARY 2024</b>			
Founders' Day	127 Years of PTA - February 17, 2024		
Graduating High School Senior Scholarship Applications	N/A	N/A	February 1
Continue Mid-Year Membership Campaign	Remit per capita membership dues	Remit per capita membership dues	Remit per capita membership dues



# CALENDAR: REMINDERS & DUE DATES

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Check with your Council/District for local due dates.  
Check the California State PTA website calendar for details, additions, and updates.  
Use this as a guide for your PTA year.

DESCRIPTION	DUE TO COUNCIL <i>OR, Insert Council Due Date(s) as needed</i>	DUE TO DISTRICT <i>OR, Insert District Due Date(s) as needed</i>	DUE TO STATE <i>OR, Insert State Due Date(s) as needed</i>
<b>MARCH 2024</b>			
Order Honorary Service Awards (HSAs)	Honorary Service Awards can be given anytime.		
California State PTA Annual Convention Registration opens	TBD online at <a href="https://capta.org/convention">capta.org/convention</a>		
Continue Mid-Year Membership Campaign – check incentive deadlines	Remit per capita membership dues <a href="https://leaders.capta.org/membership/incentives-and-challenges">leaders.capta.org/membership/incentives-and-challenges</a>	Remit per capita membership dues	Remit per capita membership dues
<b>APRIL 2024</b>			
Continue Mid-Year Membership Campaign	Remit per capita membership dues	Remit per capita membership dues	Remit per capita membership dues
<b>MAY 2024</b>			
<b>California State PTA Convention</b>	<b>May 3 to May 5, 2024 in Ontario</b> <b>All members are encouraged to attend</b>		
Teacher Appreciation Week	National: May 6-12 – California: May 6-10		
Membership Continues	Remit per capita membership dues	Remit per capita membership dues	Remit per capita membership dues
<b>JUNE 2024</b>			
Roster of Officers for Next Fiscal Year due			June 1
Volunteer Hours: Annual Historian Report due			June 1
Freewill Offering due			June 1
Finalize Year-End Membership Campaign and begin planning for next term.	Remit per capita membership dues	Remit per capita membership dues	Remit per capita membership dues

This calendar is for planning purposes. Visit the California State PTA website calendar for details, additions, and updates. Check with your PTA council (if in council) and/or PTA district for their deadlines. Some items must go through channels [\*channels: to council, if in council; or to district for out-of-council PTA units] and MUST be submitted by your council/district deadline. Items listed here should be submitted through channels, unless otherwise stated.

# E-MEMBERSHIP & LEADERS WEBSITE

## ELECTRONIC MEMBERSHIP SYSTEM

California State PTA's online membership system makes joining and renewing PTA membership at the local level easier for parents, families and community members

The electronic membership system is an additional way to collect memberships and all PTAs continue to collect and remit membership as you always have. Every district and all but a few councils are active and ready for your unit to accept electronic memberships. Units, councils and districts are not required to use the new system, but we encourage you to check it out.

**California State PTA has partnered with TOTEM for our custom electronic membership system designed specifically for PTAs in California.**

**NOT ON TOTEM?  
GET STARTED TODAY!**



**When you're a PTA leader, you're part of our team  
— and we're here to help you!**

We invite you to try the new California State PTA Leaders' Website. We've created it to better serve our local leaders by making a wealth of information easier to find. You'll find a variety of tools and resources to help you lead your PTA, keep your finances in order, increase your membership, step up your communications game, run amazing programs, find grant opportunities for your PTA, scholarships for your members, and ways to take action for all children and families. You'll need your PTA District number and California State PTA unit number (on your bylaws and membership card) to sign up. Log in today!

Our public site - [capta.org](http://capta.org) - will continue to showcase the important work we do statewide in our focus areas (Education, Family Engagement, Health & Community Concerns) as well as our Advocacy and DEI work. Our blog, publications archive, events information, and Resource Library for parents, educators, and administrators will also continue on our public site. Questions? Contact [communications@capta.org](mailto:communications@capta.org).

**for PTA<sup>®</sup>  
LEADERS  
by PTA<sup>®</sup>  
LEADERS**

**LEADERS.CAPTA.ORG**

# TAX FILING REQUIREMENTS

## Tax-exempt organizations, including PTAs, must file annual returns

Tax-exempt organizations operating in the State of California, including PTAs, are legally required to file annual returns with the following federal and state agencies:

1. **United States Department of the Treasury Internal Revenue Service (IRS)**
2. **State of California Franchise Tax Board (FTB)**
3. **State of California Attorney General's Registry of Charitable Trusts (AG/RCT)**

California State PTA is committed to providing information to help your PTA remain in compliance with its annual filing requirements. Please visit the California State PTA Tax Filing Support Center at [leaders.capta.org](http://leaders.capta.org) for step-by-step pointers on what your PTA needs to file and other useful materials.

If your PTA requires assistance completing any of the required filings beyond the information provided in the applicable forms, instructions, and publications, contracting a Certified Public Accountant (CPA) or tax professional, such as an Enrolled Agent (EA), specializing in nonprofit organizations exempt from federal and state income tax as public charities is recommended.

### 1. Internal Revenue Service - Form 990 Series

- There are three forms in the Internal Revenue Service (IRS) Form 990 series. **Only ONE should be filed** per year, which is generally based on your PTA's financial activity (refer to the chart, below).

If Your PTA's GROSS RECEIPTS Are ...	File Form	Complexity
Normally \$50,000 or less (refer to Appendix B of the Form 990-EZ instructions for guidance regarding "normally")	<b>990-N</b>	<b>Low</b>
Normally greater than \$50,000, less than \$200,000 during the year, <b>AND</b> total assets are less than \$500,000 at the end of the year.	<b>990-EZ</b>	<b>Medium</b>
Equal to or greater than \$200,000 <b>OR</b> total assets are equal to or greater than \$500,000 at the end of the year.	<b>990</b>	<b>High</b>

- The IRS requires the applicable form in the 990 series to be filed by the 15th day of the 5th month after your PTAs fiscal year ends. For example, if your PTAs fiscal year ends on June 30, the applicable form must be **filed with the IRS by November 15**. Please check your bylaws for your fiscal year end to determine your filing deadline.
- For *990 series forms and instructions*, please visit the following page on the IRS website:  
[www.irs.gov/charities-non-profits/form-990-series-which-forms-do-exempt-organizations-file-filing-phase-in](http://www.irs.gov/charities-non-profits/form-990-series-which-forms-do-exempt-organizations-file-filing-phase-in)
- If your PTA generates *unrelated business income* equal or greater than \$1,000 during the year, it may be required to file IRS Form 990-T, *Exempt Organization Business Income Tax Return*, in addition, to form 990-N, 990-EZ, or 990. For more information, please visit the following page at the IRS website:  
[www.irs.gov/charities-non-profits/unrelated-business-income-tax](http://www.irs.gov/charities-non-profits/unrelated-business-income-tax)



# TAX FILING REQUIREMENTS

## 2. Franchise Tax Board - Form 199 Series

- There are two forms in the Franchise Tax Board (FTB) Form 199 series. Only **ONE** should be filed which is generally based on your PTA's financial activity (refer to the chart, below).

If Your PTA's GROSS RECEIPTS Are ...	File Form	Complexity
Normally \$50,000 or less	<b>199N</b>	<b>Low</b>
Normally greater than \$50,000	<b>199</b>	<b>Medium</b>

- The FTB requires the applicable form in the 199 series to be filed by the 15th day of the 5th month after your PTA's fiscal year ends. For example, if your PTAs fiscal year ends on June 30, the applicable form must be **filed with the FTB by November 15**. Please check your bylaws for your fiscal year end to determine your filing deadline.
- For more information on filing requirements, Exempt Organization Forms and Publications, please visit the following page at the FTB's website: [www.ftb.ca.gov/file/business/types/charities-nonprofits/annual-and-filing-requirements.html](http://www.ftb.ca.gov/file/business/types/charities-nonprofits/annual-and-filing-requirements.html)
- If your PTA generates *unrelated business income* in excess of \$1,000 during the year, it may be required to file FTB Form 109, *California Exempt Organization Business Income Tax Return*, in addition to for 199-N or 199. For more information, please visit the page listed above for FTB Exempt Forms and Publications.

## 3. Attorney General's Registry of Charitable Trusts - Form RRF-1

- The Attorney General's Registry of Charitable Trusts (AG/RCT) requires all charitable organizations operating in the State of California, including PTA units, councils, and districts, *to be registered* with the Registry of Charitable Trusts and to file Form RRF-1 annually.
- The AG/RCT requires Form RRF-1 to be filed by the 15th day of the 5th month after your PTAs fiscal year ends. For example, if your PTAs fiscal year ends on June 30, Form RRF-1 must be **filed with the AG/RCT by November 15**. Please check your bylaws for your fiscal year end to determine your filing deadline.
- A copy of IRS form 990 or 990-EZ as filed with the IRS is required along with Form RRF-1 for registrants with gross receipts of more than \$50,000.
- Beginning with the 2019-20 fiscal year, the Registry of Charitable Trusts requires registrants with gross receipts of \$50,000 or less to file Form CT-TR-1 Treasurer's Report together with Form RRF-1."
- All registrants must include the annual registration renewal fee as indicated on Form RRF-1
- For more information, as well as the forms and instructions, please visit the following page at the Attorney General's website: [oag.ca.gov/charities/renewals](http://oag.ca.gov/charities/renewals)

**If your PTA does not have a Charitable Trust number yet, please complete the INITIAL REGISTRATION NOW. The process can take approximately 90 days to complete.**



## WORKERS' COMPENSATION

- Workers' Compensation Annual Payroll Reports and any workers' comp surcharge due should be submitted directly to AIM.
- All PTAs are required to answer the online form regardless of whether your PTA paid any individuals *or not*.
- Look for more information in the Financial Mailing distributed in Fall 2023.

For insurance purposes, all PTAs in California are required to file a Workers' Compensation Annual Payroll Report for each insurance policy year. In the report, each PTA must list anyone it paid, whether employee or independent contractor, during the insurance policy year and include some additional information related to those payments. If payments for services to those without their own workers' compensation insurance coverage exceed \$1,000, the report is also used to calculate a workers' compensation surcharge that is due with the report. Note: an employee or independent contractor's general liability insurance is NOT the same as workers' comp insurance.

In 2020, a new process was implemented for PTAs to file their Workers' Compensation Annual Payroll Report and pay any workers' compensation surcharge due, making it easier for PTAs to file the report and giving most PTAs more time to file it. That process involves submitting the report and any workers' compensation surcharge due directly to AIM, PTA's insurance broker. It also includes the ability to file the report and make payments electronically. Additional information about this process will be included in the Financial Mailing that will be distributed in the Fall of 2023. The due date to file the Workers' Compensation Annual Payroll Report and remit any workers' compensation surcharge due is January 31, 2024.



## ONLINE INSURANCE PORTAL

You will now be able to pay your insurance directly to AIM through a convenient portal. In mid-October, you will receive an email from AIM (Association Insurance Management) with a link for you to update contact info. Once you have filled out the online form, you will receive an invoice for the insurance payment. You can pay either through a secure, no fee ACH transfer from your unit bank account OR mail a unit check directly to them. Payment is due no later than December 20th or late fees will apply.

Insurance rates are determined over the summer and officially sent out following the August California State PTA Board of Managers' meeting. A budgeting rule of thumb is to use the current rate (\$272.00) plus 10%.

What can you do in the meantime?

- Make sure you include insurance in your budget (including additional coverage if purchased)
- Plan on attending the insurance webinar in early September (check our calendar on [capta.org](https://capta.org))
- Join our mailing list to receive updates and information: [capta.org/join/join-our-mailing-list](https://capta.org/join/join-our-mailing-list)
- Release the funds and have the payment authorization ready to go in October to avoid unnecessary late fees

**Visit our website for insurance updates, resources  
and help with your insurance questions**



## Tools & Resources to

# Build Membership & Market Your PTA

Easy-to-use tools and resources from our Membership Services Commission to help you plan & promote your PTA membership campaign during the back-to-school season - and all year long!

### JOIN OUR MAILING LIST!



### Membership Monday Newsletter

Sign up for our weekly newsletters on [capta.org](http://capta.org) - sent out during back-to-school season and during the spring membership drive.

### Trainings, Calls and Office Hours

Exact dates and registration links coming soon to [capta.org](http://capta.org)!

### LEARN MORE



### Customizable Tools & Worksheets

Some examples - more on [capta.org](http://capta.org)!

- Local Marketing Plan and Template Worksheet

- Local Goal Setting Template
- Membership Timeline
- Membership Theme Ideas
- Fliers and handouts in multiple languages
- Engaging men in PTA
- Sample PTA Bulletin Boards
- Membership Messaging That Works

### Even More Resources:

#### California State PTA Toolkit

[toolkit.capta.org/membership](http://toolkit.capta.org/membership)

#### National PTA Membership Materials

[pta.org/home/run-your-pta/membership-campaign](http://pta.org/home/run-your-pta/membership-campaign)



## Membership Info and Tips (for membership chairs & the whole board!)

### Dues & Remittances

- The California State PTA Membership year is from July 1- June 30.
  - Each PTA must remit dues monthly.
  - Please refer to your council and/or district PTA for due dates. Councils and districts set their own due dates in order to meet California State PTA deadlines.
  - When sending in your remittance to your council and/or district PTA, please allow additional time for them to process and mail checks to the state PTA office
- Remittances of "per capita" should be forwarded by every PTA at least monthly, and sent to your council and/or district PTA
  - "Per capita" means per-person dues and is the portion of membership dues not belonging to your PTA.
  - The unit (school) PTA remits to the council PTA if in council or the district PTA if out-of-council. The council PTA remits to the district PTA. The district PTA remits to California State PTA, which remits to National PTA.
- Electronic membership
  - Local PTAs that use the electronic membership system powered by Totem will have a dual system - remitting through channels for traditional membership and automatic remittance through the Totem system.

### Electronic Membership

California State PTA's online membership system, Totem, makes joining and renewing PTA membership at the local level easier for parents, families and community members. Visit [capta.org](http://capta.org) for information, FAQs and directions on getting started.

### Membership Envelopes & Cards

- Membership Envelopes: Available at a low-cost to local PTA units. Contact your district PTA to place your order today!
- Membership Cards: Cardstock membership cards are available through your district PTA. To print member names on the cardstock membership card, a downloadable Word template is available at [capta.org/resource/membership-envelopes-and-cards](http://capta.org/resource/membership-envelopes-and-cards)



## Spotlight Awards

*Your dedication in bringing innovative services to California's kids, families and schools deserves recognition! We want to celebrate your PTA's successes with the entire state!*

### WE WANT TO HEAR FROM YOU!

PTAs from all over California bring innovative services and creative programs to our kids, families and schools every day. PTA Unit/Council Spotlight Awards recognize successful programs that are planned, organized and implemented by PTA units and councils. We at California State PTA want to Spotlight your amazing accomplishments and give you the opportunity to share your model program with other PTA leaders all over the state.

#### CATEGORIES:

- **Advocacy** (U/C) – Advocating on behalf of all children at school, community or state and national levels.
- **Collaboration** (U/C)– Developing strong partnerships to connect individuals, enhance student learning, assist schools & families, and involve community stakeholders.
- **Communication** (U/C) – Maintaining effective and open communication with members.
- **Diversity, Equity & Inclusion** (U/C) – Adopting programs and practices that promote diversity, equity and inclusion.
- **Environmental** (U) – Promoting conservation and environmental awareness on campus.
- **Family Engagement** (U) – Promoting student success with family engagement in students' education.
- **Leadership Development** (C) – Boosting leadership capacity and development to ensure long-term growth and enhance a PTA's effectiveness.
- **Membership and Outreach** (U) – Increasing membership while raising awareness of PTA's mission and the value of membership that involves all community members.
- **Student Achievement** (U) – Implementing programs to support student achievement.
- **Student Involvement** (U) – Increasing student involvement and participation in all aspects of PTA

Visit [leaders.capta.org](https://leaders.capta.org) for:

- the Spotlight Award application
- additional details on the award categories
- eligibility information
- recognitions and prizes for award winners
- archive of previous winners





**INVEST**



**FOR YOUR CHILD**

**JOIN**



**FOR YOUR CHILD**

**ADVOCATE**



**FOR YOUR CHILD**

**ENGAGE**



**FOR YOUR CHILD**

**CHAMPION**

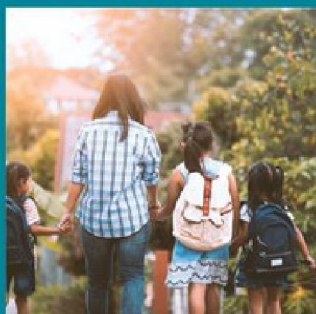


**FOR YOUR CHILD**

# PTA FOR YOUR CHILD

**MEMBERSHIP  
CAMPAIGN  
TOOLKIT**

**ACT**



**FOR YOUR CHILD**

**VOLUNTEER**



**FOR YOUR CHILD**

**GUIDE**



**FOR YOUR CHILD**

**PROTECT**



**FOR YOUR CHILD**

**CONNECT**



**FOR YOUR CHILD**

## Implementation

The *PTA For Your Child* messaging and collateral materials are designed to support your current membership outreach strategy via the activities and communication channels you are already using to recruit new members and renewals. To kickstart your planning, we've outlined a campaign implementation checklist for you to build into the first 30 days of annual recruitment and to use throughout the year.

- ☐ **View the Training Webinar:** Participate in the *PTA For Your Child* membership campaign training webinar for further details about the campaign. This training webinar is available on the National PTA's [website](https://pta.org/home/run-your-pta/membership-resources/membership-campaign). (pta.org/home/run-your-pta/membership-resources/membership-campaign)
- ☐ **Read Through the Campaign Toolkit:** Thoroughly review this toolkit and accompanying PowerPoint templates so you can understand how to incorporate the campaign messaging and visuals into all membership communications for your school community.
- ☐ **Inform and Educate the Executive Board:** Share and review the membership campaign with the full executive board.
- ☐ **Update Your Website:** Update the language about membership and add a clickable JOIN NOW button on your PTA website using the graphics provided with this toolkit. This should link directly to your member registration page.
- ☐ **Make Joining Easy:** Add membership language and a JOIN PTA link to all social media platforms and hyperlink social media images directly to your member registration page.
- ☐ **Create a Membership Communications Schedule:** Develop a weekly communications schedule of 1-3 social media posts and/or listserv posts per week in the first 30 days.
- ☐ **Vary the Visuals:** Use a variety of the campaign's social media images, alternating the *PTA For Your Child* and "No Wrong Way To PTA" images to engage followers.
- ☐ **Directly Solicit Families:** Send out the "Sample Membership Ask Email/Letter" and then follow-up with those who join using the "Sample Thank You Email/Letter."
- ☐ **Use Consistent Branding:** Clearly and consistently brand all membership appeals and relevant PTA events with the campaign visuals. This includes using the campaign hashtags in all social media posts related to membership recruitment.
- ☐ **Ask, Ask, Ask:** Don't stop soliciting members after the school year is underway. Be sure to include messaging and the benefits and impact of PTA membership in communications throughout the year.



## 4 KEY STEPS

### Step 1: Getting Started

#### **President:**

- Appoints bylaws committee, chaired by parliamentarian

#### **Parliamentarian:**

- Sets meeting date for bylaws committee
- Goes online – [www.capta.org](http://www.capta.org) – to sign up for California State PTA's eBylaws Program to update bylaws

*Please be advised that currently the only bylaws version available in our eBylaws Program is the English version*

- Reviews current bylaws prior to the meeting
- Provides copies of current bylaws for bylaws committee members

#### **Bylaws Committee:**

- Reviews current bylaws to see if any changes are necessary
- Lists proposed amendments, including article, section and page number

#### **Parliamentarian:**

- Uses eBylaws Program to complete the proposed amendments and then downloads a PDF of the prepared bylaws document; or uses the fillable PDF to make proposed amendments and save a copy with the changes
- Prints double-sided, hard copy of bylaws to keep for unit reference

#### **Executive Board:**

- Reviews updated bylaws with proposed amendments, if any, at board meeting
- Votes to approve
- Secretary records outcome in Minutes



### **Additional Bylaws Resources & Information**

- [leaders.capta.org/leadership/bylaws-and-standing-rules](http://leaders.capta.org/leadership/bylaws-and-standing-rules)
- [leaders.capta.org/leadership/ebylaws](http://leaders.capta.org/leadership/ebylaws)

### Step 2: Submit Bylaws

#### **Parliamentarian:**

- Submits the bylaws through channels to be signed by the California State PTA parliamentarian
  - a. If in council, email the PDF bylaws document to the council parliamentarian or other representative as designated by the council.
  - b. If out of council, email the PDF bylaws document to the district parliamentarian or other representative as designated by the district.

### Step 3: Adopt Bylaws

After approved bylaws are signed by the State Parliamentarian and returned to your unit through channels:

#### **President:**

- Puts adoption of bylaws amendments on agenda for next association meeting
- Notifies members of proposed amendments at least 30 days in advance of the meeting

#### **Members:**

- Vote to adopt bylaws at an association meeting, with a two-thirds (2/3) vote required

#### **President and Secretary:**

- Sign and date master set of bylaws for secretary to keep in their files
- Sign and date copies of bylaws for the president and parliamentarian

### Step 4: Complete Process

#### **Parliamentarian:**

- Upon adoption of the bylaws, the unit parliamentarian will:
  - Send confirmation of adoption via signed and dated bylaws through channels to the council and/or district (ask your council and/or district about special requirements)
  - Make copies of bylaws for executive board members
  - Upload the adopted bylaws – including completed signature page – in one pdf file to the "Document Management" section in MyPTEZ.

**Did you know that there's a fast and easy way to update unit bylaws? Use the California State PTA's eBylaws program online!**



## **STAGE 1 - Before using eBylaws, you'll need to get a user name and password:**

- Sign-in/Register for [leaders.capta.org](https://leaders.capta.org). Click "Leadership/Bylaws," and then "Standing Rules/eBylaws." This will take you to [leaders.capta.org/leadership/ebylaws](https://leaders.capta.org/leadership/ebylaws).
- On the eBylaws home page, click on "Request a Username & Password" button.
- Fill in the form with your name, contact information, and user type. If you are not a parliamentarian, select "assistant." Click "Next".
- Select your PTA district number/name, and then your PTA council name. Enter your school/unit name, city, and the California State PTA ID number found on the front cover of your current bylaws. Reach out to your council or district if you need help.
- Enter a username of your choice (all lowercase) and make sure to write it down! Click "Next," followed by "Submit."
- You will receive an eBylaws password in three to five days, and you'll be ready to prepare bylaws!

## **STAGE 2 - Once you have a password, go online to eBylaws ([www.ebylaws.capta.org](https://www.ebylaws.capta.org)):**

- Go to [capta.org/pta-leaders/services/ebylaws/](https://capta.org/pta-leaders/services/ebylaws/) and click "Access eBylaws," then log in with your username and password.
- Click on your unit name in the listing.
- The first screen is the "Unit Information Record." Information on this page can only be entered or changed by California State PTA. If this information is complete and correct, click "Next." If the information is incorrect, please contact your district for assistance.
- Move through each screen, confirming or changing information as needed.
- Click "Save" often as you navigate through the process; this can show you where there may be problems that need correction (areas needing correction will be outlined in red on the specific page.)
- When you reach the final screen, click "Save" one final time. A green notification box will appear in the top right corner if no corrections are needed. If red notifications appear, the process is incomplete, and corrections are still needed.
- Once the bylaws are complete, click on the "Bylaws" button to generate and download a PDF file of the bylaws. Make sure to review the document!
- If there is a DRAFT watermark on the bylaws document, there is something that must be corrected before submission through channels. Go back into eBylaws and go through each screen, looking for information boxes outlined in red. Hover over the outlined areas for guidance to correct the issue. Once they are corrected, click on the "Bylaws" button to download a new PDF file of the bylaws.

## **STAGE 3 - Prepare your bylaws for submission:**

- Review each page of the bylaws PDF to make sure information is correct as submitted in eBylaws and as intended.
- Complete a Bylaws Submittal Form and include it with the bylaws in the submission to the council, if in council, or to the district. The Bylaws Submittal Form can be downloaded from the California State PTA Toolkit, found at [toolkit.capta.org](https://toolkit.capta.org).

# Online Community

Post. Tweet. Like. Share. Comment. Tag. Connect.

- Join us online, everyone is welcome!
- Meet up with other PTA leaders on your favorite social media platform.
- Encourage your members to be part of our online PTA Community.
- Advocate, learn, and join the conversation on key issues and topics that impact the lives of all children, youth, and families in California.
- Share your news or celebrate the achievements of your PTA with other PTA members throughout the state.
- Follow us to get the latest updates and valuable information on subjects you care about, upcoming events, and opportunities for all members.

 @CaliforniaPTA  
 @California\_State\_PTA  
 @CaliforniaPTA

 FOLLOW US!

## #PTA4Kids

# Online Resources

SCAN ME



## PTA Guidelines

Who should read these?

- Executive Board
- Communication VP/Chair
- Newsletter Chair
- Social Media Chair

## PTA Advocacy on Social Media

Who should read this?

- President
- Communication VP/Chair
- Newsletter Chair
- Social Media Chair
- Legislative Advocacy VP/Chair

SCAN ME



SCAN ME



## Cyber Security/Phishing

Who should read this?

- Everyone!

## Visual Identity Standards

Who should read this?

- Communication VP/Chair
- Newsletter Chair
- Social Media Chair
- Membership VP/Chair
- Program/Event VP/Chair

SCAN ME



## Communication Tools for PTAs

Take advantage of these guides that walk you through applying as a non-profit to TechSoup and other free tools to get the word out and connect with your audience before, during, and after an event.

SCAN ME





# Resources

## on Focus Areas

Get information on issues affecting your child, school and community. Our mission is to positively impact the lives of all children and families. Our wide-ranging advocacy efforts include community concerns, education, family engagement and health, all of which impact the current and future success of California kids — and our state as a whole.

### IN THIS SECTION

#### Advocacy and Legislation

- Legislation and Local Advocacy

#### Convention

- Save the Date & Budgeting Table

#### Education

- Supporting student success, measuring success and resources

#### Family Engagement

- Handouts, tips, resources, and the PTA Family-School Partnership Program

#### Health and Community Concerns

- Information and Resources

### ADDITIONAL RESOURCES

On our website: [capta.org/focus-areas](https://capta.org/focus-areas)

#### ADVOCACY

- Current Legislation
- Position Statements
- Resolutions
- Advocacy Updates
- Legislative Action Reports
- State Ballot Measures

#### FAMILY ENGAGEMENT

- Family-School Partnerships
- School Smarts Parent Engagement Program
- Tips for Parents
- Parents' Rights
- Support Military Families
- Early Childhood Development
- Preparing for College

#### EDUCATION

- Arts Education
- Career Tech Ed and College Readiness
- Curriculum
- Every Student Succeeds Act
- Expanded & Summer Learning
- Homework
- Local Control (LCFF/LCAP)
- School Finance
- Special Needs
- STEAM/Next Generation Science
- Student Assessments
- Ed100

#### HEALTH & COMMUNITY CONCERNS

- Suicide Prevention
- Bullying Prevention
- Foster Youth
- Teen Drivers
- LGBTQIA+
- Homeless Youth and Families
- Immigrant Children and Families
- Child Trafficking & Abuse
- Health and Academics
- School Wellness
- Nutrition
- Health Care and Immunizations
- Dental and Oral Health
- Vaping and Tobacco Use Prevention
- Drug and Alcohol Prevention
- Gun Violence Prevention

## Everyone loves a good bake sale, but...



...PTA doesn't exist as a school fundraising operation. PTA was initially founded as an **advocacy organization** and remains one today, seeking ways to improve the lives of children, youth, and families.

In our early days, PTA helped bring Kindergarten, school lunch programs, polio vaccines, child labor protections, the juvenile justice system, and media content ratings to our communities. In later years, PTA supported health education programs, class-size reductions, disaster-preparedness planning, a full curriculum (including arts and physical education), and **robust parent involvement** in schools.



More recently, our advocacy efforts have expanded to **address inequities**, promote inclusion, fight discrimination, remedy the effects of the pandemic, safeguard students' social/emotional health, and secure adequate, stable funding for education.

Whether it's at the local, state, or national level, **PTA is an ally**, providing programs and tools that offer our members ways to solve problems, speak up for kids, and take action on their behalf.



► If you want to step up and do something to improve the lives of your own children – and ALL children – then PTA Advocacy is for you! Join us as we work to shape policy and support legislation that positively impacts our schools and communities.

## Plan your year in advocacy.

Want to incorporate a successful advocacy program into your local PTA?

It makes sense for PTA members to join together to make the most of our collective voice. PTAs participate actively in the process through which policy decisions are made that affect their families and students. Here's how to begin:

- **Select an Advocacy Representative** Every PTA should have its own advocacy representative. Select an engaged member to lead this effort (which may include a full committee). Use the guidelines outlined in the Toolkit to create a job description that suits your PTA's needs (Legislative Advocacy Chair). Enter their contact info into PTA-EZ!
- **Budget for development.** Leadership development is an important function of local PTAs. Ensure the strength of your advocacy program by budgeting funds for your Advocacy Representative to attend your District, State, or National Legislation Conference. The California State PTA Legislation Conference (slated for January 22-23, 2024) is a two-day event in Sacramento that offers attendees the opportunity to hear from state policymakers, legislative leaders, and education experts to learn the latest about issues affecting children, youth, and families. Representatives prepare for and participate in meetings to advocate directly with their legislators and network to learn from each other. In the spring, attend the annual California State PTA Convention to get further training and join in advocacy workshops.
- **Learn, grow, report, act!** Attend California State PTA online legislation calls, read advocacy updates from our Legislation Team, and learn more so that Advocacy Representatives can report back to membership and take action when needed. Other activities may include conducting voter registration drives, hosting a candidates' forum, writing a resolution, calling on local lawmakers, or speaking up at school board or city/county government meetings. Further advocacy information is in the Toolkit. Advocacy resources from National PTA can be found at [pta.org](https://pta.org).

### JOB DESCRIPTION



### LEGISLATION CONFERENCE



### TOOLKIT - ADVOCACY



# JOIN US FOR THE CALIFORNIA STATE PTA 125TH ANNUAL CONVENTION

MAY 3 - 5, 2024 | ONTARIO, CA

## *Did you know...*

every PTA can send at least 2 **voting** members to convention, so along with training and networking opportunities, your unit has a voice in how California State PTA operates.

## *What will we have at convention?*

- 50 Workshops - training for leaders, programs for members, educational updates
- Voting on Resolutions - 4 Resolutions were Adopted in 2023 & provide a foundation for our advocacy efforts.
- Exhibit Hall - Meet vendors to bring to your school, from fundraising to assemblies and more.
- Reflections Gallery - Enjoy the beautiful art that is created by student from across the state.
- Network and meet fellow leaders to collaborate and share ideas.

## *Planning for Convention*

### **REGISTRATION FEES**

While registration has not been officially set, for budgeting purposes, you can plan on \$250 early bird price per delegate or \$350 for regular registration. Registration will open in March.

### **HOTEL COSTS**

The Doubletree by Hilton is our convention hotel. For planning purposes, the rooms base rate will be around \$180 a night.

**PER DIEM (for food)** Your unit's per diem may be found in your unit bylaws. The state PTA's per diem is \$16 for breakfast, \$18 for lunch, and \$33 for dinner.

“I had no idea how big PTA is. Or what the function of PTA is beyond the local unit. My eyes were opened to what we do.”

## *What can you do now?*

You can use the following template to help inform your Unit, Council, or District PTA to estimate what should be added to the budget for convention.

How do you go about getting this approved to attend Convention?

1. Bring this to your Executive Board and mention the benefits of attending California State PTA Convention.
2. Identify if any other members of the board would like to attend.
3. Make a motion to the Executive Board to recommend to the General Association that they add this budget line item.
4. Bring this to the next General Association Meeting for approval
5. Check the [capta.org](https://capta.org) website in March so that you can sign up with the early bird registration and book your hotel room!

Convention Expense	Cost Per Person (estimated to approve in your budget)	# of Delegates	Total Cost
Full-Time Delegate(s)	~ \$250 Early Bird ~ \$350 Regular Registration		
One-Day Delegates	~ \$150/\$200		
Student Delegates	~ \$150		
Mileage (~.65 cents) / Airfare			
Hotel Cost	~ \$180 + taxes		
Per Diem			
<b>Total Convention</b>			



## Supporting Student Success

Our teachers and students continue to work hard to make up for the learning loss that occurred during the pandemic. Teachers have adapted to new learning methods, aligned with state standards, and supported all students despite difficult circumstances. Now is an excellent time to start preparing for a successful school year ahead.

### Connect with your student's school

It is important to stay connected with your school. At the beginning of each school year, it is beneficial to meet with your student's teacher to understand your student's learning goals, class expectations, and how you can support your child's education. This will help you to be an active participant in your student's education and ensure that they are getting the most out of their school experience.

Here are some questions you can ask:

- What are the learning goals for my student this year?
- How can I help my student manage their time effectively for success?
- How much time will my student need for homework outside of class?
- How are my student's specific learning needs, such as medical conditions, IEP, or 504 goals and accommodations accounted for in your class?
- How much time will student learning be computer-based?
- How will you support my student's social and emotional well-being throughout the school day?
- Will there be opportunities for my student to study art and music this school year? Research shows that studying the arts improves performance in core subjects.

PTAs should invite the school principal and teachers to their regular meetings where parents and caregivers can hear about learning goals and curriculum focus areas. Has the school described the changes to how they teach science since they implemented Next Generation Science Standards (NGSS) a few years ago? Arts education is also an important topic to discuss with school leaders. You can also become an active voice in the school-site council and Local Control Accountability Plan (LCAP) development at your school district.

**Looking for activities to do with your student?** Visit California State PTA's Resource Library to explore, learn and discover information on various topics, including arts, family engagement, health, science, and more together:  
[capta.org/resource-library](https://capta.org/resource-library)

The California State PTA website has a dedicated curriculum section where you can find information about English Language Arts, Math, Social Studies, Science, Technology, Engineering, Arts & Math (STEAM), and much more:  
[capta.org/focus-areas/education/curriculum](https://capta.org/focus-areas/education/curriculum)



SCAN FOR OUR  
EDUCATION INFO





## MEASURING PROGRESS

Teachers, parents, and caregivers use class assignments, tests, and grades to assess how well each student is doing. These measures look different from school to school and even from classroom to classroom. California has a statewide testing system that allows you to see how well your student is doing compared to the state's expectations. The California Department of Education has introduced a new user-friendly electronic report that allows you to check student scores and understand what they mean. The state has also created a website called Starting Smarter specifically designed for parents and caregivers to provide helpful information. To find out more, visit [ca.startingsmarter.org](https://ca.startingsmarter.org).

PTAs can share important information on how to find these resources with parents and caregivers through meetings, newsletters, and social media. At your unit meetings, you can also discuss overall school performance and address any questions. The California School Dashboard provides a summary of various measures to help community members and educators assess how well local schools and districts are meeting common goals and to see clearly where improvement is needed. At [caschooldashboard.org](https://caschooldashboard.org) you can look up any school or district in the state. You'll also find helpful videos and other resources to guide conversations about school accountability.

What you find on the California School Dashboard is just the beginning of the conversation. PTA units and councils across California are creating a variety of forums for discussions about how these indicators are measured and how schools in a district differ in terms of their results. Your PTA could try one or more of the following:

- Using [Ed100.org](https://ed100.org) for short meeting topics
- Meet with other leaders at other schools to compare notes
- Have a subcommittee that works closely with the School Site Council or have a Site Council update on your agenda
- Put a discussion of your school's Dashboard results on a PTA meeting agenda, and ask your principal to explain the school's plans related to the local indicator topics



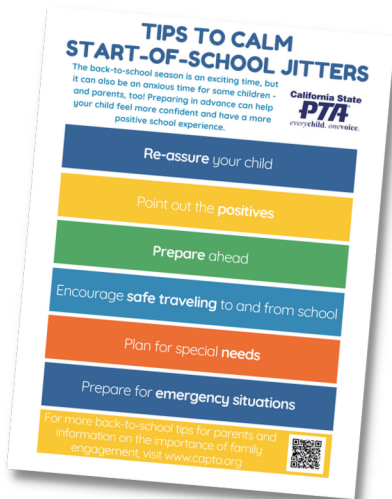
### RESOURCES TO LEARN MORE

Go to [capta.org/focus-areas/](https://capta.org/focus-areas/) and hover over the top menu item, Focus Areas to see:

- Education subjects include Arts, Career Technical Education, College Readiness, Curriculum (English, Math, Social Studies, Arts and Science), Homework, School Finance, Special Needs, ED100, and more.
- LCFF/LCAP subjects include Accountability Plans, Priority Areas, and Dashboard.
- Diversity, Equity and Inclusion which includes information, tools, and links to National PTA resources



Involved families make a huge difference in the lives of children. When your PTA is recruiting members, share this info-graphic to help them see just how impactful their time can be!



## WHY BE INVOLVED IN YOUR CHILD'S SCHOOL?

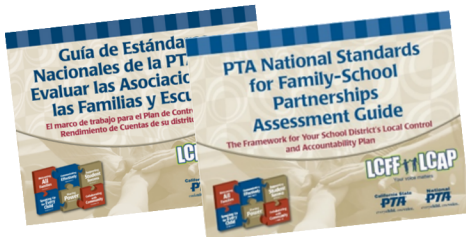
Strong family-school partnerships make big differences. When families and schools work together, our kids win.

## TIPS & RESOURCES

Back-to-school can be a stressful time for children/families who are new to the school or children who feel anxious about returning to school.

Share this resource in your newsletter, at your PTA membership table, your first association meeting, or send it home in your school's welcome packet. Find them in English and Spanish on [capta.org/family-engagement](http://capta.org/family-engagement)

Don't forget to use these guides as you plan your events, programs and communications! Use the assessment tool to see where your school rates in the six PTA Family-School Partnership Standards as the foundation of your plans to make your campus more inclusive and welcoming for all children and families!



### PROMOTE

Healthy development and wellness

### GRADUATION RATES

increase when families are involved on school campuses



### INCREASE

your child's social and academic skills

### DECREASE

Drop out rates and behavior problems



**MAKE A DIFFERENCE FOR YOUR CHILD**  
[capta.org/family-engagement](http://capta.org/family-engagement)

# PTA NATIONAL STANDARDS FOR FAMILY-SCHOOL PARTNERSHIPS

As a PTA leader, you can boost family engagement at your school by relying on PTA's National Standards for Family-School Partnerships. The standard offers a blueprint on how to connect families and schools to support student success.

The six Standards, which focus on what parents, schools and communities can do together to support student success, are:



## 1 Welcoming All Families into the School Community

Families are active participants in the life of the school and feel welcomed, valued and connected to each other, to school staff and to what students are learning and doing in class

*Getting Started: Focus on how to break down barriers at your school. Put in place a Welcoming Committee and bilingual greeters and interpreters for meetings. Hold PTA meetings in community locations such as a local library or community center.*

## 2 Communicating Effectively

Families and school staff engage in regular, two-way, meaningful communication and learning

*Getting Started: Set up ways for families and school staff to connect better using multiple formats for communication. Organize social gatherings such as a school BBQ for everyone to get to know each other better.*

## 3 Supporting Student Success

Families and school staff continuously collaborate to support students' learning and healthy development, both at home and at school, and have regular opportunities to strengthen their knowledge and skills to do so

*Getting Started: Offer opportunities for parents to learn more on how to support student learning at home. Identify what parents need to know with a survey and hold Parent Education Nights on topics reflecting their interests. Provide tip sheets on parent-teacher conferences, homework help and how to handle the tough issues in raising children and teens today.*

## 4 Speaking Up for Every Child

Families are empowered to be advocates for their own and other children to ensure that students are treated fairly and have access to learning opportunities that will support their success.

*Getting Started: Publicize your school's family engagement policy and get parent and student feedback to update the policy. Hold Parent Information Nights on how to be an effective advocate, how to identify and support learning styles and ways to foster student achievement.*

## 5 Sharing Power

Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices and programs

*Getting Started: Build a culture of inclusion to engage parents in school decision-making that supports student success. Ensure that your PTA membership and leadership reflects your school community with parents from all neighborhoods to promote access and diversity.*

## 6 Collaborating With the Community

Families and school staff collaborate with community members to connect students, families and staff to expanded learning opportunities, community services and civic participation.

*Getting Started: Partner with community and business leaders to provide resources and support the cultural, recreational, academic, health, social and other needs of families at your school. Welcome community members such as alumni and retired neighbors as volunteers for school activities and events.*

**When families, schools and communities work together, all students have an opportunity to thrive in school and beyond.**

**DOWNLOAD A COPY OF THE COMPLETE STANDARDS AND ASSESSMENT GUIDE AT [CAPTA.ORG/FAMILY-ENGAGEMENT](https://capta.org/family-engagement)**



## COMMUNITY CONCERNS

### PTA'S MISSION DOESN'T START AND STOP AT THE SCHOOL DOOR.

Our children can't learn, grow and succeed in school if they're facing major challenges at home, in their neighborhoods and in their broader communities.

PTA's mission doesn't say we only focus on schools — it says that we work to "positively impact the lives of all children and families." That means seeking support for abused children, advocating for foster kids, preventing bullying and much more.



**LEARN MORE**

[capta.org/community-concerns](https://capta.org/community-concerns)



## HEALTH & SAFETY

### KIDS' HEALTH: IT'S UP TO ALL OF US



**LEARN MORE**

[capta.org/health-safety](https://capta.org/health-safety)

Families, teachers and researchers know that our kids can't grow, learn and succeed when they're not healthy.

That's why California State PTA members are dedicated to promoting effective health education programs and services in schools and communities in order to offer children, youth and families the skills, tools and abilities they need to make healthy choices.

Through action in the State Capitol, in our schools and in our neighborhoods, concerned California parents and community members advocate for statewide health programs, and we actively participate on a wide variety of statewide committees addressing mental, physical and environmental health issues.





# Resources

## *Programs & Services*

While we have a whole range of programs and events, they all have a single mission at heart: to improve the lives of children and families. We've always got a lot going on! Ranging from school-based programs to statewide events, we have opportunities to engage parents, inspire kids, advocate changes and train tomorrow's leaders today. To find out more and get involved in any of these events or programs, please contact your local PTA.

### IN THIS SECTION

**Reflections Art Program**

**Member Perks**

**School Smarts Family Engagement Program**



### ADDITIONAL RESOURCES

**Leaders' Website:** [leaders.capta.org](http://leaders.capta.org)

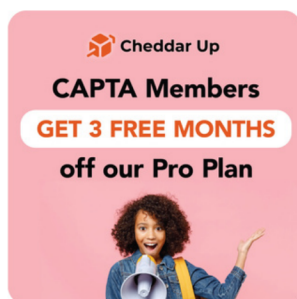
- Member Perks
- MyPTEZ
- Reflections
  - Theme contest
  - Running a Reflections Program at your school.
  - Reflections for Councils and Districts

**School Smarts**

- Why School Smart Matters

# Summer 2023 MEMBER PERKS

## PERKS FOR PTA MEMBERS



### BRING SIMPLER PAYMENTS TO YOUR FAVORITE GROUP

Cheddar Up is a free group payment platform used and loved by groups of any kind —whether it's your child's sports team or troop, a booster club, an office gift pool, or even your own small business. As a California State PTA member, new subscribers get 3 FREE months of Cheddar Up's Pro features. Use code CAPTA2023 at checkout. While Cheddar Up is always available for free, its Pro plan offers more in-depth reporting, our best ecommerce capabilities, and eChecks, which have a rock-bottom fee. Your group will thank you for this seamless way of collecting — no more spreadsheets and busy work. And, your peers will delight in the seamless paying experience (covering both online and in-person payments with our card reader). Don't miss this deal! Pass it on to all your favorite group organizers!

### DELIVERED FRESH FROM THE FARM WITH FARM FRESH TO YOU

**Farm Fresh To You** has been farming, organically, since 1976 and has built a sustainable network of California farms that deliver organic produce, meat, dairy, eggs, and so much more straight to your doorstep all year! There's no commitment, no contract, no delivery fees, and no service fees. Payment is made after delivery so you can inspect the goods first—you "Pick it or Skip it"! California State PTA members can get an ongoing **20% discount** by using **promo code CAPTA** when ordering through the Farm Fresh To You website. Simply enter your zip code then enter your delivery options, box size and any additional add-on items. If your zip code comes up as "not deliverable" please contact Elizabeth Sudman to set up your account manually at: 916.849.0587 or email [esudman@farmfreshtoyou.com](mailto:esudman@farmfreshtoyou.com). Click here for a downloadable flyer with more information.



### CELEBRATE BIRTHDAYS, GRADUATIONS, TEACHER APPRECIATION & MORE WITH A GROUP VIDEO GIFT

Get 20% off when you create a VidDay group video — it's the perfect gift to celebrate birthdays, graduations, teacher appreciation, thank a coach, and all other special occasions. It's fun for everyone! No app download or editing skills are needed. You can start for free by visiting [vidday.com](http://vidday.com) and see how easy it is to invite friends and family to submit video messages to wish a happy birthday, say congratulations to a graduate, or give gratitude to a teacher or coach. Video messages and photos are automatically collected for you to come together in a one-of-a-kind, beautiful video montage. Plus, you and invitees can chip in on a gift card to send along with the surprise video. Save 20% when you use promo code CAPTA20 at checkout and give a gift they'll never expect or forget.



# Summer 2023 MEMBER PERKS

## PERKS FOR PTA MEMBERS



### JOIN MORE THAN A BANK. JOIN AN ORGANIZATION WITH PURPOSE.

At SkyOne Federal Credit Union, we make your mission, our mission, "To positively impact the lives of all children and families." That's why we are proud partners of the California State PTA. At SkyOne we're passionate about our members, providing personalized financial solutions and serving our community. [Join](#) SkyOne Federal Credit Union today and receive \$50! Plus, SkyOne will reimburse you \$10 for your California State PTA membership dues for the first year! Just make sure you choose that you belong to California State PTA.

### PERKS FROM NATIONAL PTA

As a member of California State PTA you also have access to **National PTA Member offers!** Whether you're buying school supplies for the kids or renting a car for your next family vacation, PTA members can save money on everyday purchases, special discounts, fundraising opportunities, and other unique deals. Be sure to [click here](#) to check out your National PTA Member Offers, too!



## PERKS FOR PTA UNITS



### JOIN SKYONE FEDERAL CREDIT UNION

We understand how important keeping track of finances is for PTA units. SkyOne makes it easy and convenient to update your bank, signers, and officers—and it can be done virtually! Plus, for a limited time, if your unit opens an organizational account with us, we will donate \$1,000.00 to your PTA for every 10 unit members that join SkyOne. For more information on PTA unit accounts and our special offer, [click here](#).

### PTA MANAGEMENT, ONLINE AND SIMPLIFIED

Cheddar Up is a free group payment platform used and loved by PTAs nationwide — and as a California State PTA member, new subscribers can unlock our Team Annual or Pro Annual features for 30% off. Use code CAPTA1023 at checkout. Why take advantage? Pro plans offer more in-depth reporting, our best spirit wear shop capabilities, and eChecks, which have a rock-bottom fee. Schools who use eChecks raise 2x as much as those who don't! Say goodbye to creating your own spreadsheets, and join us to collect payments online, create custom forms, and track donations automatically. It takes mere minutes to set up your custom web page, and the collection options are endless — teacher gifts, ticket sales, fundraisers, school gear, and so much more. Our card reader even integrates in-person sales with online totals. You'll soon see why thousands of schools trust [Cheddar Up](#) for all their payments.



California State PTAs get

**3 FREE  
MONTHS**

off our Pro Plan





2023-2024

**CALL FOR  
ENTRIES!**

**I am  
Hopeful  
Because...**

**Explore the arts and  
express yourself!**



**Learn more and get involved!  
[PTA.org/Reflections](https://pta.org/reflections)**

# MAKE THE MOST OF THIS SCHOOL YEAR

WITH

Newly Updated  
Curriculum!

## school smarts

CALIFORNIA STATE **PTA**<sup>®</sup> PARENT ENGAGEMENT PROGRAM

Boost PTA membership and engage families by hosting a School Smarts Parent Academy this school year! Give families the tools to be advocates for quality education while building your school community!

7  
Weekly  
Sessions

In-person  
or  
Virtual  
Delivery

Qualifies for  
funding under  
Title I and/or  
LCAP Priority  
3

Award-winning  
Curriculum

Contact [Programsupport@capta.org](mailto:Programsupport@capta.org)  
or visit [www.capta.org/schoolsmarts](http://www.capta.org/schoolsmarts)  
for more information



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or visit [www.capta.org/schoolsmarts](http://www.capta.org/schoolsmarts)  
for more information



# Ed 100

Sure, California's education system is complex.

Should that stop parents and students from speaking out as leaders?

No way.

**You got this.**



## Ed100.org helps you

Ed100 explains the system plainly, one clear lesson at a time, so you have the credibility and confidence you need to be heard and make a difference.

**Yes, it's free!**

**California State**  
**PTA<sup>®</sup>**  
*everychild. onevoice.*

Ed100 works with the California State PTA to create informed parent leaders

- ✓ Each lesson takes a few minutes to complete in English or **en español**
- ✓ Visit **Ed100.org** to sign up for the **self-paced** lessons and our weekly email newsletter, which helps you keep learning
- ✓ Each quiz you pass counts toward your Ed100 **graduate certificate**
- ✓ Learn together with others and **win up to \$1,000** for your school community



ASSOCIATION  
INSURANCE  
MANAGEMENT INC

# PTA Insurance

Affordable insurance  
tailored for your PTA

## California State Parent Teacher Association PACKAGE:

- General Liability \$1,000,000
- Directors & Officers Liability \$1,000,000
- Fidelity Bond (Crime) \$25,000
- Workers Compensation

For over 30 years, AIM has been the national leader in providing specialty insurance for PTAs. We insure more than 22,000 groups across all 50 states.

## Optional coverages:

- **Property**  
Coverage for personal property owned by your PTA (raffle items, fundraising merchandise, popcorn machines...)
- **Extended Medical** (supplement to General Liability)  
Increase in medical payments coverage from \$20,000 per person, to \$50,000 per person for injuries sustained at your events. (access without suit being filed.)
- **Media Liability** (supplement to General Liability)  
Misuse of Logo, copyright, pictures or other confidential information on your website or Social Media.



Call us today!

1-800-876-4044  
aim-companies.com



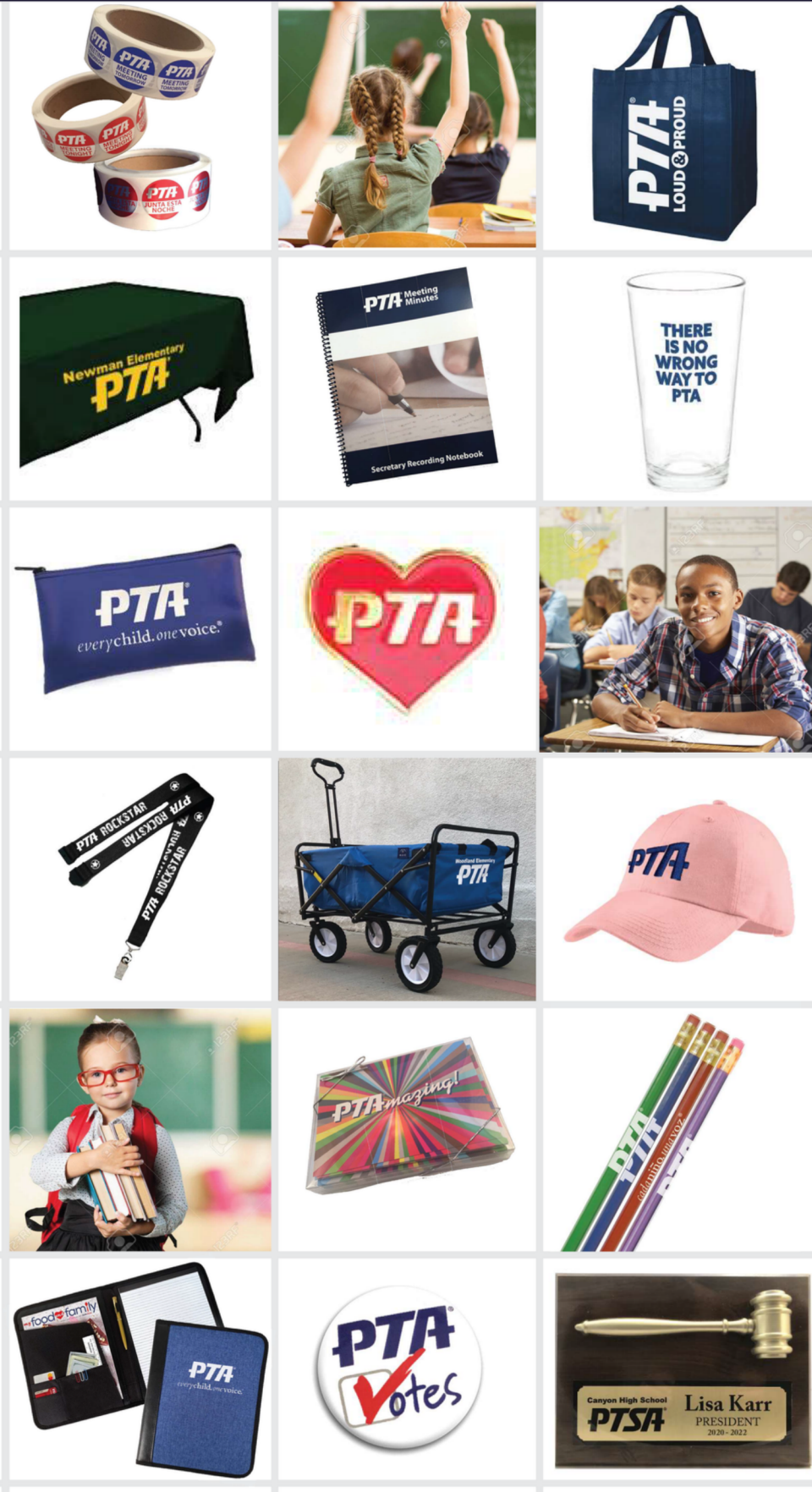


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Drinkwear



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